

Voluntary Report – Voluntary - Public Distribution

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Report Name: Grain Update December 2022

Country: Ukraine

Post: Kyiv

Report Category: Grain and Feed

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Report Highlights:

This report is intended to capture the estimated changes in the trade of major grains for marketing year (MY)2022/23 resulting from the extension of the Black Sea Grain Initiative for the next 120 days at the end of November 2022. MY2022/23 corn production estimates were updated as well.

This report is an update for our previous [GAIN Report UP2022-0082](#) (UP2022-0082) covering wheat, corn, and barley. Please refer to the UP2022-0082 for detailed information about the production, trade, and consumption numbers.

Production

According to the information available to Post at the time of the report writing, the corn harvest has not yet been concluded. As of early December 2022, around 40 percent of corn areas were unharvested. The delay of corn harvest for MY2022/23 could be attributed to a combination of factors:

- financial strain for some farmers due to the direct and indirect losses caused by the armed conflict with Russia;
- a reportedly high moisture in corn ears;
- low farm-gate prices make corn drying economically unviable;
- blackouts caused by Russian missile strikes on Ukrainian energy infrastructure disrupt the functioning of grain silos, especially the ones that rely on electricity for drying up their grains.

Post decreased its MY2022/23 corn production volume down to 23.1 million metric tons (MMT), compared to around 25.8 MMT previously quoted in [UP2022-0082](#), based on yield estimates available as the result of the 60 percent of corn areas already harvested.

Exports

MY2022/23 export volumes have been revised based on the [Operational Update of November 17, 2022](#), by the Black Sea Grain Initiative (BSGI)s Joint Coordination Centre. Post-estimated export volumes for all grains (wheat, barley, and corn) have been increased from 1.8MMT up to 4.2MMT for the next four months (from December 2022 until March 2023) in line with the extension of the BSGI for 120 days. Post's export estimates from March 2023 onwards are still based on the conservative assumptions that BSGI will not be extended again in March.

The Ministry of Agricultural Policy and Food of Ukraine reported nearly 4 MMT of grains were exported in November 2022, including barley – 291,000MT; wheat –1.6 MMT; and corn –2 MMT.

Based on the upgraded assumptions about the export bandwidth as well as actual November 2022 export numbers, Post estimates the following export numbers for MY2022/23:

- Wheat – 15.1 MMT
- Barely – 2.8 MMT
- Corn – 20.2 MMT

Ending Stocks

Based on the updated export estimates for MY2022/23, Post assumes that Ukraine will be able to deplete its ending stocks of wheat and barley to pre-conflict levels, while corn would stay on the high side, at 8.3MMT. Post will make the relevant adjustments for corn-ending stocks upon the availability of additional information on corn harvest areas that might be abandoned.

Production, Supply, and Distribution Data Statistics

Barley Market Year Begins Ukraine	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2584	2592	2680	2680	1900	1781
Beginning Stocks (1000 MT)	953	953	661	670	880	811
Production (1000 MT)	7947	7947	9923	9923	6400	6000
MY Imports (1000 MT)	48	48	1	1	0	3
TY Imports (1000 MT)	48	48	1	1	0	3
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	8948	8948	10585	10594	7280	6814
MY Exports (1000 MT)	4187	4178	5705	5704	2400	2800
TY Exports (1000 MT)	5053	5053	2700	6194	2400	2800
Feed and Residual (1000 MT)	2900	2900	2800	2980	2700	2600
FSI Consumption (1000 MT)	1200	1200	1200	1099	1200	1000
Total Consumption (1000 MT)	4100	4100	4000	4079	3900	3600
Ending Stocks (1000 MT)	661	670	880	811	980	414
Total Distribution (1000 MT)	8948	8948	10585	10594	7280	6814
Yield (MT/HA)	3.0755	3.066	3.7026	3.7026	3.3684	3.3689

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Barley begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Corn Market Year Begins Ukraine	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5395	5395	5486	5486	4500	3780
Beginning Stocks (1000 MT)	1478	1478	832	2732	4573	11023
Production (1000 MT)	30297	30297	42126	42126	31500	23100
MY Imports (1000 MT)	21	21	15	18	0	15
TY Imports (1000 MT)	21	21	15	18	0	15
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	31796	31796	42973	44876	36073	34138
MY Exports (1000 MT)	23864	23864	27000	27336	15500	20200
TY Exports (1000 MT)	23864	23864	27000	27336	15500	20200
Feed and Residual (1000 MT)	5900	4100	10200	5510	9500	4700
FSI Consumption (1000 MT)	1200	1100	1200	1007	1200	900
Total Consumption (1000 MT)	7100	5200	11400	6517	10700	5600
Ending Stocks (1000 MT)	832	2732	4573	11023	9873	8338
Total Distribution (1000 MT)	31796	31796	42973	44876	36073	34138
Yield (MT/HA)	5.6158	5.6158	7.6788	7.6788	7	6.1111

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Corn begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Wheat Market Year Begins Ukraine	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6847	6847	7409	7409	5250	5008
Beginning Stocks (1000 MT)	1504	1504	1505	901	5811	4492
Production (1000 MT)	25420	25420	33007	33007	20500	19900
MY Imports (1000 MT)	132	124	143	87	100	65
TY Imports (1000 MT)	132	124	143	87	100	65
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	27056	27048	34655	33995	26411	24457
MY Exports (1000 MT)	16851	16847	18844	18842	11000	15100
TY Exports (1000 MT)	16851	16847	18844	18842	11000	15100
Feed and Residual (1000 MT)	2600	3300	4000	4787	5500	3000
FSI Consumption (1000 MT)	6100	6000	6000	5874	5200	4900
Total Consumption (1000 MT)	8700	9300	10000	10661	10700	7900
Ending Stocks (1000 MT)	1505	901	5811	4492	4711	1457
Total Distribution (1000 MT)	27056	27048	34655	33995	26411	24457
Yield (MT/HA)	3.7126	3.7126	4.455	4.455	3.9048	3.9736

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Wheat begins in July for all countries. TY 2022/2023 = July 2022 - June 2023

Attachments:

No Attachments.